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ABSTRACT

In 1996, membership or subscription contributions provided 23% of public broadcasting's $1.9 billion income. Detailed information about the contributing audience can help managers maintain and grow member support. As part of the annual Yankelovich Monitor survey, the Corporation for Public Broadcasting gathered extensive demographic, attitudinal, and product usage data about people who donated money to public broadcasting. Of the total population polled, 13% said they had donated to either public radio or television in the past two years. This report explores characteristics of donors versus non-donors and suggests ways in which this information can be used by stations. The report looks at demographics, confidence, attitudes about learning, financial issues, musical tastes, leisure activities, television viewing habits, and privacy issues. Donors to public broadcasting overall are primarily older, proportionately more female, college educated, married, and white in comparison to the non-donor population. The median household income for donors is $58,000 compared to $35,000 for non-donors. Donors have a high level of confidence in advice from doctors, pharmacists, financial planners or bankers, magazine reports, and recommendations by travel agents. Both donors and non-donors have low levels of confidence in news reports on television and in newspapers, the ability of public schools to educate children properly, and advice from lawyers. The top three leisure activities for donors and non-donors are reading, spending time with friends and family, and watching television. (SWC)

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Who Donates To Public Broadcasting?

Profiles of Donors from the Monitor Survey

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According to the CPB Annual Revenue Report, membership is the largest source of income for public broadcasting. In 1996, membership or subscription contributions provided 23% of public broadcasting's $1.9 billion dollar income.[1] Detailed information about the contributing audience can help managers maintain and grow member support.

As part of the annual Yankelovich Monitor survey, CPB gathered extensive demographic, attitudinal, and product usage data about people who donate money to public broadcasting.[2] Of the total population polled, thirteen percent said they had donated to either public radio or television in the past two years. This research note will explore characteristics of donors vs. non-donors and suggest ways in which this information can be used by stations.

Respondent Groups

The survey divides participants into categories, according to their listening, viewing, and contributing habits. This evaluation concentrates on four groups.

Donor (13%): donated to public radio or TV in the past two years.
Non-Donor (87%): have not donated to public radio or TV in the past two years.
Donor/Radio (8%): donated to public radio or TV in the past two years—and listens to public radio at least occasionally.
Donor/No Radio (4%): donated to public radio or TV in the past two years—and never listens to public radio.

We assume that donors who **never** listen to public radio are contributors to public television. However, donors who listen to public radio could be contributing to either of the two public broadcasting media, and possibly to both. Therefore, the Donor/Radio category, while most likely including a

[1] CPB Annual Revenue Report, Fiscal Year 1996.
[2] Yankelovich Partners conducted a survey with 4,000 respondents in 1996.

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large number of television donors, can be considered a target market for public radio.[3] Radio development professionals will want to focus their attention on this group, while television development professionals will find their target market in both groups. Interestingly, the data reflect some differences between the two groups. Note that approximately two-thirds of the public broadcasting donors listen to public radio.

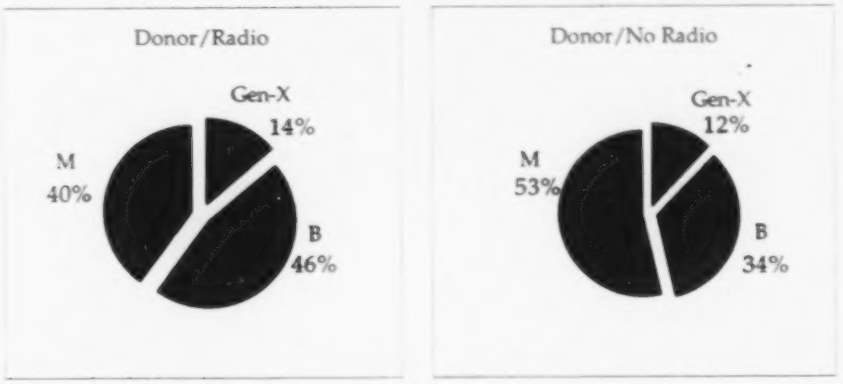
Throughout this report, we will use the term donor/listener to denote the donors who listen to public radio and the term television donor to denote the donor group that never listens to public radio.[4]

Demographics

Donors to public broadcasting overall are primarily older, proportionately more female, college educated, married, and white in comparison to the non-donor population. Only 13 percent of donors are under the age of 30. The median household income for donors is $58,000 compared to $35,000 for non-donors.

Chart 1: Donors to Public Radio and Television by Age Group

Survey participants were placed in three age categories: **Generation X** (ages 16-30), **Boomers** (ages 31-50), and **Matures** (ages 51+).



However, the demographics of the donor/listener group differ from the television group. Donor/listeners are younger (mean age 48), 55 percent female, and earn a median household income of $62,000. Public television donors have a mean age of 53, are 60 percent female, and earn a median household income of $52,000. Donor/listeners are three times as likely to have graduate school education than television-only donors.

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[3] The Donor/Radio Group is larger in this sample than the Donor/No Radio Group, so we can safely assume that a large number of television donors are also in this group.

[4] The survey does not ask directly about public radio donors, as the sample size would be too small for analysis purposes.

Confidence
Donors have a high level of confidence in advice from doctors (62%), and recommendations made by pharmacists (54%). Although the overall percentage is lower, donors have substantially more confidence than non-donors in advice from financial planners or bankers (36% compared to 29%), reports in magazines (19% compared to 13%), and recommendations by travel agents (22% compared to 12%). Donors have the most confidence in their own abilities (82%), and an older person's advice (63%).

Both donors and non-donors have similarly low levels of confidence in news reports on television and in newspapers, the ability of public schools to educate children properly, and advice from lawyers. More donors to public broadcasting described themselves as "intelligent," "well-read," and "well-educated," than non-donors. Public television donors were less likely to use these self-descriptors than donor/listeners.

Attitudes About Learning
Ninety-four percent of donor/listeners identified themselves as "always looking to learn something new," as compared to 87 percent of non-donors. While 63 percent of non-donors said that they were "overwhelmed by all of the sources of information available today," only 51 percent of donors felt that way.

Forty-four percent of donors to public broadcasting have a college degree or higher, while only 17 percent of non-donors have a college-level education. Consequently, the two groups have different views of education. Non-donors are more likely to believe education is important "as a means of getting ahead in the world," while donors are more likely to believe education is important "as a means of becoming a more cultured, well-rounded person."

Financial Issues
In all categories, a greater percentage of donors are saving money for various aspects of their future. These include retirement, vacation, emergencies, and their children's education.

There was a noticeable difference in the savings priorities of donor/listeners and public television donors. Both groups were saving for "serious" concerns, such as retirement and emergencies, at almost exactly the same rate. However, 47 percent of donor/listeners said they were saving for a vacation, compared to 39 percent of public television donors. Donor/listeners like to travel: travelers in this group average over seven trips a year.

Sixty-six percent of donors said they would rather spend their money on experiences that would enrich their lives—travel, vacations, theater, good restaurants—even though there are many things that they would like to own.

Fifty-eight percent of non-donors agreed with this statement.

Musical Tastes

The type of music most frequently listened to by donors was "oldies" (47%), with the same preference level in both donor groups. Traditionally however, oldies do not dominate the play lists of most public radio stations. Classical music was the second most listened to music (42%), followed by easy listening/light sounds, jazz, opera/ballet, and alternative/new age.

Leisure Activities

The top three leisure activities for donors to public broadcasting were reading, spending time with friends and family, and watching television. Non-donors picked the same three activities as their top choices; however, watching television was their first choice.

Chart 2: Activities Most Likely To Do With Spare Time for Fun & Enjoyment

	Donors	Non-Donors	Donor /Listener	Donor/No Radio
read	68%	49%	67%	69%
spend time with friends and family	60%	55%	62%	55%
watch television	59%	65%	59%	57%
call friends and family	54%	49%	57%	49%
take a walk	52%	39%	54%	46%
go to the movies	46%	39%	50%	40%
work in the yard	45%	34%	44%	45%
garden	41%	26%	42%	38%
attend concerts/live performances	35%	20%	35%	34%
shopping	31%	37%	35%	34%
exercise	30%	23%	35%	21%
visit a museum	24%	10%	24%	23%
arts and crafts	24%	10%	19%	24%

A significantly greater percentage of people in the donor/listener category enjoyed spending time with friends and family, taking walks, going to the movies, and exercising than those who donated to public television. In all of the other leisure categories listed above, both types of donors had similar levels of interest.

Television Viewing Habits

Donors to public broadcasting are discriminating television viewers. Seventy-five percent turn on the television to watch a specific program, compared to 55 percent of non-donors. Conversely, they are less likely to "surf" channels than non-donors. There is not a significant difference in the hours of television watched by donors and non-donors. Both groups watch between two-and-a-half to three-and-a-half hours of television on a weekday, and slightly more on weekends.

Donors watch more news and science and nature programming than non-donors, and less of everything else, including nighttime comedies, current affairs and entertainment programming and late night entertainment. Eighty-four percent of donors said they watched public television within the last week, compared to only 52 percent of non-donors.

Privacy Issues

Participants in the Yankelovich survey agreed that it has become far too easy for businesses to find out important information about themselves. Serious violations of privacy included sales of mailing lists without permission of those named; businesses collecting and supplying data to marketing companies; and unsolicited phone calls for the purposes of selling products or services.

In each instance, donors to public broadcasting were more sensitive to these marketing tactics. For example, 79 percent of donors felt the sale of mailing lists was a serious invasion of privacy, as compared to 67 percent of non-donors. Donors and non-donors alike were least offended by unsolicited phone calls for fundraising purposes, although 58 percent of donors still felt that it was a serious privacy violation. There was no significant difference of opinions on privacy issues between donor/listeners and public television donors. Among the total population, concerns about privacy tend to increase with age.

Conclusion

Overall, this survey confirms much of what is already known about the public broadcasting audience and donor groups. For stations attempting to target programming, underwriting, and fundraising toward their current audience and potential donors, the following section highlights several recurring themes and suggests possible applications for this information.

To Whom Will They Listen?

Which underwriters are likely to capture the attention of the donor audience? These data tell us that donors to public broadcasting value advice from doctors, pharmacists, financial planners and bankers, magazine reports and recommendations by travel agents. These business areas are more likely to resonate with viewers and listeners, particularly the core audience that donates to your station. Information about these services is likely to be perceived as valuable, rather than merely intrusive.

Donors have the most confidence in their own abilities and in an older person's advice. While this information has fewer implications for underwriting, it is useful for fundraising. For example, older radio and television personalities may be able to exercise a greater influence on the decision to donate to public broadcasting.

The Importance of Reading

Reading was the number one activity donors were most likely to do with their spare time for fun and enjoyment. Fifty-four percent of donors considered themselves well-read, compared to 30 percent of non-donors. Forty-eight percent of public television donors, and 58 percent of donor/listeners felt this way. In addition, reading was tied with listening to music as the number one way to relax (69%). This data suggests that books would make effective fundraising premiums, and books by and about public radio personalities and events could be used to generate revenue for stations. In addition, this emphasis on reading likely extends to families with children.

Money Matters

Donor/listeners have a far higher median household income ($62,000) than public television donors ($53,000), and non-donors ($35,000). This is most likely due to a correlation of income with education. Retirement is the highest priority for savings with all groups. Vacation is the second highest priority with all groups except public television donors, who are more concerned with saving for emergencies. Donors will respond well to programming about issues related to retirement, especially financial planning for retirement. Travel and vacation planning will be another strong programming interest.

Privacy Matters

Recently privacy issues have become a topic of public concern and media attention. As public broadcasting fundraising efforts expand beyond the traditional on-air pledge drive, fund-raisers need to take care with the issue of privacy to viewers and listeners. If stations choose to solicit by telephone, for example, they need to be aware of possible negative reactions from more than half of the donors. Stations that do not use these tactics might publicize pledge drives as an alternative to more invasive types of fund-raising.

This research note was prepared with the assistance of Jennie Josephson, a CPB research intern. If you have any questions about these data, please contact Janice Jones at (202) 879-9677, fax (202) 783-1019, or e-mail jjones@cpb.org. We also welcome any comments and recommendations about how to make the data more useful to you.